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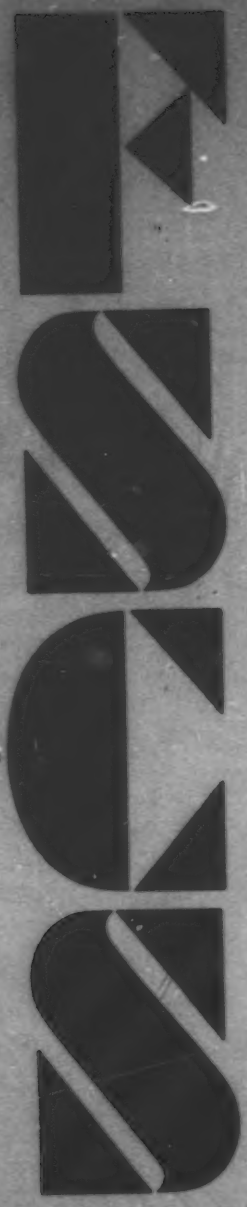
AN ACTION PLAN FOR A FEDERAL-STATE COOPERATIVE SYSTEM FOR PUBLIC LIBRARY DATA



Developed by the
TASK FORCE ON A FEDERAL-STATE COOPERATIVE SYSTEM FOR PUBLIC LIBRARY DATA

with the support of the
U.S. NATIONAL COMMISSION ON LIBRARIES AND INFORMATION SCIENCE

and
NATIONAL CENTER FOR EDUCATION STATISTICS

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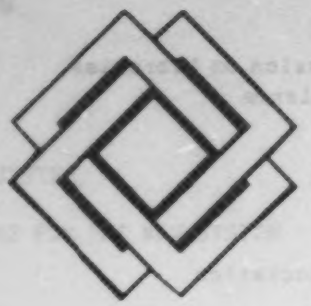

An Action Plan
for a
Federal State Cooperative System
for
Public Library Data

F S C S

Developed by the Task Force

with the support of the

U.S. National Commission on Libraries and Information Science

and the

National Center for Education Statistics

April, 1989

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FOREWORD AND APPRECIATION

The development of this Action Plan for a Federal-State Cooperative System for Public Library Statistics is an excellent example of productive cooperation between two Federal agencies with a mutual interest in achieving a national objective and responding to a national legislative mandate. This Action Plan provides the basis for the first national education survey to be reported, edited, and tabulated completely in machine-readable form.

The achievement was accomplished primarily through the establishment by the two Federal agencies of a Task Force for Public Library Data with key representatives of the two agencies and representatives of national and State organizations with similar strong interests in producing accurate, reliable, annual State and national public library statistics. Representatives of State library agencies were very helpful in developing the Action Plan, with the State Library of Ohio providing particularly important assistance.

The hard work and dedication of all those who served on the Task Force is gratefully recognized and appreciation to all is hereby recorded.

John G. Lorenz
Task Force Chair

For more than 100 years the national collection of public library statistics has shifted through cycles of ups and downs. Now at last the Federal government is committed to develop and administer an annual collection, analysis, and dissemination of public library data under a Federal-State Cooperative System.

SUMMARY OF THE ACTION PLAN

Facts about library resources and services are essential for effective management of libraries and accurate assessments of their operations.

The country's public libraries can provide excellent service only if policy makers, library administrators, and citizens have reliable, up-to-date information. They need to know about individual libraries and, for comparisons, about groups of libraries and about all public libraries.

For over a century various agencies and groups throughout the country have collected public librarystatistics. Today all 50 State library agencies collect data for their own States. And yet the country still lacks a comprehensive national program to collect public library data.

In 1985, the Federal Department of Education's National Center for Education Statistics (NCES) and Division of Library Programs sponsored a successful pilot project which collected data in 15 states. In 1988 Congress authorized and appropriated funds for NCES to "acquire and diffuse" useful statistics about libraries.

To carry out this mandate NCES and the National Commission on Libraries and Information Science (NCLIS) created a task force to plan a program to establish the Federal-State Cooperative System for an annual comprehensive national collection of public library data.

The Action Plan recommended by the task force will work like this:

Components

A universe file (a name authority file) of all public libraries in the country.

A list of 41 elements with standard definitions for which the system will collect data.

Publication of data in a wide variety of forms and their wide dissemination.

Participants and Responsibilities.

Public Libraries. Collect local library information. Relay information.

State Libraries. Gather information from local libraries. Train staff of local libraries in data collection. Relay information to NCES in computer readable form.

NCES. Compile data for the nation. Assist States and coordinate their work. Sponsor training. Sponsor national continuing education and meetings for participants. Publish and disseminate data. Contract initially with NCLIS and subsequently with Chief Officers of State Library Agencies (COSLA) to carry out some of these responsibilities.

ACTIONS NEEDED TO CREATE AND OPERATE THE NEW SYSTEM

First Steps

-- The National Center for Education Statistics (NCES) and the State library agencies should work together to achieve participation in the system by all 50 States.

-- Each State in the Federal-State Cooperative System for Public Library Data (FSCS) should appoint a State data coordinator to be responsible for liaison with NCES, supervision of the annual collection of statistics from public libraries, and submission of that data to NCES.

-- Participating State library agencies and NCES should create and maintain a universe file which identifies and categorizes the public library entities in each State.

-- The 41 data elements listed with corresponding standard definitions in Appendix B of this report should be collected in 1989.

Continuing Actions

-- Participants and others involved with the FSCS should annually evaluate the list of data elements and their definitions and appropriate modifications should be made.

-- Annually between July 1 and 31, participating States should submit to NCES the data for the most recent, complete fiscal year for which data are available.

NCES'S Responsibilities and Actions

-- NCES should allocate an appropriate number of permanent full-time staff positions to implement the task force's recommendations.

-- NCES and the States should develop an implementation plan which delineates the responsibilities of federal agencies, State library agencies, and others to carry out the recommendations of the task force.

-- NCES should develop a system to collect data annually from State library agencies regarding their administrative operations and services on behalf of public, academic, and school libraries within each State.

-- NCES should supply microcomputer equipment and software to the participating State libraries so that data can be reported by all States in a uniform, machine readable format specified by NCES.

-- NCES should provide training for State data coordinators to assist them in working with local library staffs and with the data collected from those libraries.

-- NCES should establish a continuing education program for State a coordinators. The program will include regular gatherings for an exchange of ideas and information among participating States and NCES.

Oversight Panel

-- NCES should establish and appoint a panel of involved persons to provide oversight for the implementation of the FSCS.

-- Annually the panel should plan and assign responsibility for the publication of the data in a variety of formats. These might include issues-oriented articles in the public administration/management press for policy makers, customized reports for government officials, and articles in periodicals published by the American Library Association (ALA) and other organizations.

Communication of Data

-- NCES should provide State, regional, and national tabulations and should make institutional data available in a variety of formats, including machine readable ones.

-- NCES staff should give special attention to the clarity of documentation so that machine readable formats can be used by persons outside of NCES.

-- NCES should arrange for printing of enough copies of its reports to provide, directly from NCES, reasonable numbers of copies to cooperating States, national associations library schools, and individuals. Further, NCES should make sure there are enough copies for distribution to Federal documents depository libraries by the Superintendent of Documents of the U.S. Government Printing Office (GPO) and for purchase from the GPO.

Supporting Groups

-- The Chief Officers of State Libraries Association (COSLA), ALA, and ALA's Public Library Association (PLA) should encourage public libraries to cooperate by submitting data to their State library agencies accurately and on a timely basis.

-- The Library Programs Division of the Office of Educational Research and Improvement (OERI) should utilize its research funds to finance projects needed to strengthen the FSCS.

CONGRESSIONAL AUTHORIZATION AND APPROPRIATIONS FOR THE NEW SYSTEM

In 1988, Congress passed and appropriated funds for the School Improvement Act (P.L. 100-297). This legislation mandates the establishment of a Federal-State Cooperative System for the annual collection of public library data. The law assigns to NCES responsibility for developing the new system. All States are to encouraged to join but participation is to be voluntary.

THE TASK FORCE

In February, 1988, NCES and the National Commission on Libraries and Information Science (NCLIS) signed a memorandum of understanding to confirm their commitment to develop a Federal-State Cooperative System for Public Library Data (FSCS). The two groups created a task force to develop an action plan for the establishment of the system. Members are policy planners involved with statistics and public libraries at the Federal, State, and local levels and representatives of professional associations.

The task force began meeting in March, 1988, working as a whole and in small, issue-oriented groups. Members worked on the identification of data elements to be collected, standard definitions for data elements, data collection methods, assessment of future State and federal participation, analysis and publication of data, and training requirements for participants. The task force's plans and recommendations for the new program to collect and communicate public library data are in this report. The names and affiliations of the task force members are on page 00.

BACKGROUND ON THE NEW SYSTEM

National plans to collect information about public libraries began more than a century ago. When the U.S. Office of Education (USOE) was established in 1867 Congress defined its responsibility as:

> "to collect such statistics and facts as shall show the condition and progress of education, to diffuse such information as shall aid the people of the United States in the establishment and maintenance of efficient school systems, and otherwise promote the cause of education."

Within nine years, this new Federal agency had collected a massive amount of information on libraries alone and had published an impressive report, **Public Libraries in the United States.** It included both descriptive and statistical information.

Eventually, in 1937 the appropriation bill for the USOE authorized the establishment of a library services unit. Among uses specified, the funds were "for expenses necessary for the Office of Education, including surveys, studies, investigations and reports regarding libraries."

The new library services unit immediately began the collection of public library statistics. These statistics, which revealed an appalling lack of public library services in the rural areas of the nation, became a major impetus for the passage in 1956 of the Library Services Act to develop rural public library services. This act was a forerunner of the present Library Services and Construction Act.

One result of this Federal grant program has been the strengthening of the State library agencies in the 50 states. Another has been their improved collection of public library statistics, in part to measure and report on the impact of the Federal grants. In addition, Federal agencies did some initial work with the states to collect public library statistics using uniform standards and definitions of terms. This brought the advantages of decentralization of collection at the State level and centralization of analysis and dissemination at the Federal level.

One product of this effort was **Library Statistics: A Handbook of Concepts, Definitions and Terminology,** published in 1966 by the American Library Association (ALA). It was the first detailed, codified, and widely disseminated standardization of terminology and specific listing of data items by type of library.

In July, 1965 through an Act of Congress relating to a USOE reorganization, the National Center for Education Statistics (NCES) was established within USOE. This centralized the responsibility for the further national collection, analysis, and reporting of all education statistics.

In 1966, a National Conference on Library Statistics was cosponsored by USOE and ALA. Discussion focused on the need for and uses of library statistics and on proposed methods of establishing an efficient nationwide data collection system. This conference led to an ALA project supported by the NCES that resulted in a report in 1970 on **Planning for a Nationwide System of Library Statistics.** Two recommendations of the report said:

> "A program of shared responsibility between NCES and the States...is essential and should be highly defined, coordinated, and regularized.
>
> "Training programs, with appropriate instructions, manuals, meetings, etc. are essential to the national statistics program, both at the State and local levels, for general understanding, accuracy of returns, and compliance.

One result of that comprehensive report was the development of the Library General Information Survey (LIBGIS) which was designed as a coordinated, national system involving Federal, State, and local participation. Despite a demonstration project in 1972-73 involving six States, the ambitious project never attained full operational status. Coordination difficulties between NCES, state representatives, and contractors, together with the transfer from manual to automated procedures, prevented LIBGIS from achieving the success first expected. Reduced Federal funding and changing priorities in the early 1980s brought on the demise of the LIBGIS program.

PUBLIC LIBRARY STATISTICS ARE ESSENTIAL TO GOOD MANAGEMENT

Public libraries across the nation fill important educational, informational, economic, cultural, and recreational needs of the people they serve. Their continuing ability to fill these needs is essential to the life of the nation. Reliable, consistent public library statistics will provide both the basis for effective management and a continuing assessment of the status of public libraries. These statistics must be collected, analyzed, and disseminated annually at community, State, and Federal levels.

Community, county and regional libraries need statistical data about their own operations to assess their current status and to plan and budget for future services. They employ statistics to support budget requests and to take a position on proposed changes in rules and regulations or on legislation being considered by governing bodies.

State libraries need reliable and current public library statistics to plan and develop legislative and budget proposals for State government. State libraries also rely on statistics to assess the condition and progress of public libraries and to evaluate the thrust and focus of grant and other service programs.

In **the Federal government** both executive and legislative branches need public library statistics. They are essential for planning and developing desirable national legislative programs and budgets.

At all levels of government, public library statistics are needed to assess the results of programs and expenditures. decision makers then can determine if expected results are being achieved or whether changes in programming and expenditures should be made.

At local and State levels, standard public library statistics are essential for pertinent comparisons with other public libraries of similar size and characteristics. These comparisons inform legislative and appropriations decision makers at local and State levels. They also serve as a rationale to support their decisions.

Public library statistics, therefore, are an essential element in the stewardship of a public service agency. They form the equivalent of an annual report to the stockholders (the taxpayers) on how their investment has been used and with what results. Such responsible and accurate reporting is an important aspect of good government at any level.

LIBRARY STATISTICS HAVE WIDE USE

A recent pilot project for the collection of public library statistics identified major users of these data. The project's 1987 report states:

> "Legislative and administrative groups in the Federal government will use them to plan, administer, and monitor Federal programs related to libraries. Statistics are needed, for example, to support periodic review of legislation such as the Library Services and Construction Act. Statistics are also needed to help shape recommendations of the National Commission on Libraries and Information Science and to assist governmental and Congressional officials planning such programs as postal

recommendations of the National Commission on Libraries and Information Science and to assist governmental and Congressional officials planning such programs as postal services legislation and telecommunications regulations--programs which have a substantial though indirect impact on library services.

"Legislators and planners at the **State level** will use national statistics both for the information they convey about their own states and because they enable comparison of libraries in one State with those of nearby or similiar places. This use of descriptive statistics for comparative purposes is particularly important to regional agencies which enable individual libraries to expand the services they offer without significantly expanding their costs.

"At the **local level**, public librarians working with boards of trustees and/or city managers or county commissioners need national statistics in order to compare plans and performance of a local library with others nationwide. Such comparisons are a great support to planning for effective use of local funds and funds received from State and Federal sources.

"Companies in the **private sector** which sell products and services to libraries need reliable national statistics for developing business plans and marketing strategies.

"Finally, **journalists and educators** will use library statistics for what they reveal about the availability use of a major education institution in a particular area and thus about the level of participation in a learning society." (emphasis added)

To these user groups at least four more can be added. Each can benefit from the use of public library data.

Corporations that are considering moving or adding new locations often evaluate the quality of public library and information services in various communities. These services are important assets both for employees and their families and for the operations of a corporation.

National professional library associations need current and comprehensive public library statistics on which to base their positions on national governmental programs. They take positions on legislative proposals in the United States Congress. They work to persuade Federal executive departments to initiate or support legislative proposals to improve and develop public library services. Associations rely on sound, up-to-date statistical data as a basis for positions on annual appropriation proposals as they come before the Congress for action.

Similarly, **State and regional library associations** need standardized, accurate, and current public library statistics. They use this data to develop and support positions on state legislative and appropriation proposals for libraries.

Finally, **researchers** need objective, compatible public library data extending over long periods of time. Only with these statistics can they establish reliable and valid conclusions on all aspects of public library administration and services.

Each of these groups needs access to reliable, annual public library data. A cooperative investment to produce and disseminate these data will benefit them all.

Earlier Projects As Guides.

State libraries can serve as guides to public library data gathering. A 1984 ALA study of data collected by NCES and other agencies found that all 50 State library agencies collected statistics annually from public libraries in their States. The general topics on which they collected data were similar, but specific items were not. Therefore the results could not be compared from State to State. ALA's Office for Research that made the study for the U.S. Department of Education recommended that NCES persuade the States to collect a limited set of key items in a standard way. The States would report these data to NCES. NCES could then compile national State and national summaries. COSLA supported the recommendation of this report.

Pilot Project Demonstrated a National System Can Work

As a followup to this study, the U.S. Department of Education financed an ALA pilot project to explore the feasibility of a system to coordinate the annual collection of data from public libraries in the 50 States. NCES would periodically report the results. Funds came from two units of the Department's Office of Educational Research and Improvement, the Division of Library Programs, and NCES.

In October, 1985 a newly appointed advisory committee invited chief officers of all 50 State library agencies to participate in the project. The 15 participating States were: California, Colorado, Florida, Idaho, Indiana, Minnesota, New Hampshire, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, Utah, Washington, and Wyoming.

At the pilot project's conclusion in August, 1987, the final report recommended immediate expansion of the pilot project into a 50-State system. Many of the recommendations from the project are incorporated in the plans for the new Federal-State Cooperative System.

Public Library Data Service for Large Public Libraries

While the pilot project was operating, ALA's Public Library Association (PLA) designed a Public Library Data Service (PLDS). PLDS actively solicits data from all public libraries in the U.S. that serve populations of over 100,000, as well as from a considerable number of libraries serving smaller populations. A questionnaire is mailed to the libraries annually. The report gives information about individual libraries and shows national and regional summaries using means, ranges, and quartiles. The first report was issued in July, 1988.

The major differences between the two data collection systems are the number of participating libraries, the library-specific nature of the PLDS reports, and in FSCS the use of States for data collection. PLDS collects and reports unedited data from approximately 600 public libraries, of which about 400 serve populations of 100,000 or more. These 600 libraries constitute about five percent of the nation's approximately 8,600 public libraries but offer services to about 60% of the nation's population. The Federal-State Cooperative System based on the pilot project will, when fully developed, collect and report edited public library data, State by State, reports from all public libraries, and provide national totals. The two projects, therefore, complement each other. They serve, as intended, different purposes.

THE ACTION PLAN FOR THE NEW SYSTEM

The Universe File of All Public Libraries

In collecting data about public library service it is essential to identify the types of agencies providing this service. Among these agencies (or entities as the task force refers to them) are all the organizational units that provide or support public library service. These include (but are not limited to) single building community libraries, county and regional libraries with multiple outlets, and library systems.

Fifty years ago, the primary entities that provided public library services were city or county libraries or a combination of the two. The majority operated out of a single building, served a clearly defined population, and received their funding solely from local sources.

Today, many types of entities and jurisdictions provide a wide variety of services, sometimes serve the same population groups, and receive funds from a variety of sources. The most significant change has been the development of public library systems and networks. These may or may not provide direct library service to the public. They may provide staff,

materials, or funding (or a combination of these) to member libraries. Some systems contract with member libraries to secure from them various system services.

The task force identified the types of entities that the universe file will include. These categories of library service units will be the basis for comparisons between entities of the same type. The categories also will be used to collect data through sampling.

Using these types of entities, each State library agency should compile and categorize a file of the public library entities in its State. NCES should specify the hard copy or machine readable formats for these files. Annually, each State should update its file for NCES. Appendix A of this report is an outline of the characteristics for each entity in the universe file for which data will be submitted.

The 41 Data Elements in the Bank of Information

All elements of data which are part of the Federal-State Cooperative System must meet three criteria. The data must be: readily available; of high quality; and useful.

Availability Most of the data elements collected by the recent pilot project meet the criterion of availability. In assessing their use for the new system, the task force divided them into three categories: core data elements, expanded data elements, and tabled data elements.

Core Data Elements. These are of critical importance in supporting policy decisions at all governmental levels. Because they provide a basic descriptive core of public library service, they will be the foundation of the Federal-State Cooperative System. The States continuing to participate in the pilot project reported these elements in 1988 and all states in the new cooperative system will report these elements in 1989.

Expanded Data Elements. These are important and useful but more difficult to collect than the core data elements. Difficulties are caused by the methods of collection, burdens the data collection process may impose, or lack of availability of the information from small libraries. These data elements, therefore, are not included in the 1988 or 1989 reporting cycles.

It is less important now to allocate resources to the expansion of data elements than to gaining the participation of all States in the new system. The task force encourages States, however, to continue to collect these expanded data elements, using the definitions from the pilot project. In the future these elements may be added to the new system.

Tabled Data Elements

These are elements that need further study. This is because of concerns about the definition of the data elements or about the quality of the information likely to be reported. It is unlikely that the new system will request these elements.

Quality

Assessing the quality of reported data is a complex process in which the pilot project provides guidance. In 12 of the 15 States participating in 1987, staff of State libraries screened the data submitted and made informal evaluations of reliability. These staff members also gave advice on the screening of the data. All concurred that improving the quality of the data was a vital concern. This improvement depends on providing education and training at the local level and over a period of several years.

Usefulness

The data elements used in the pilot project were those that State libraries had gathered before the pilot project began. State libraries had found the information to be useful in making policy and management decisions.

The list of proposed data elements for the new system with definitions for each appears in Appendix B. All these data elements are core elements. A combined list of all core and expanded data elements are in Appendix C. Participants and others involved with the system should evaluate the list of data elements annually and make appropriate adjustments.

Definitions and Standards for the Data

Definitions--Consistent and Open to Change

The cooperative system must produce accurate, reliable data. To ensure this will require standard, precise definitions for data elements and uniform procedures for collecting data. Without consistent definitions and comparable procedures for data collection, reliable comparison, interpretations, and analysis become difficult, if not impossible, to make.

The definitions for data elements which the task force recommends are those the pilot project adopted and tested through use. These definitions incorporate the practices of State libraries and the Public Library Association's Public Library Data Service. The task force made only minor changes in these definitions. The task force recommends that the new system develop procedures for review and revision of the definitions.

In addition, the NCES standards procedures for the release of data files and publication of survey data and results require adherence to standard statistical classifications, definitions, and data sources. The definitions of data elements adopted when the system begins, however, should not be considered unchanging. They will need regular review and revision.

Some changes will result from the experience of participants in the cooperative system. Others will be brought about by the initiation of public library services and programs in response to needs. Finally, changes from the addition of new data elements will need to be defined.

The cooperative system requires a method for reviewing and revising not only definitions but also the data collection/reporting procedures which accomodate these revisions. NCES should work closely with the State data coordinators to develop a structure for making these changes.

Recommendations for Future Study and Action

After several years of using the data elements and definitions, the participants in the cooperative system should take action in these fields:

Population of legal service area

Develop definitions and standard methodologies for determining the population served by a reporting library. These definitions need to accommodate public library systems, cooperatives, and federations that serve portions of an individual library's service area population.

Contractual services. Develop definitions that standardize the reporting of contractually supplied services, such as bookmobile services and rotating film collections. This will eliminate duplicate reporting of services, materials, and expenditures.

Central and branch libraries. Consider elimination of the distinctions between central and branch libraries in the data file. This differentiation may not be necessary after the development of the universe file.

Capital and operating expenses. Evaluate the variations among States of definitions of capital expenses and, if warranted, develop new distinctions to ensure uniformity of data.

Physical facility space. Consider collecting and reporting this information.

Registered borrowers. Experience may demonstrate that a greater number of public library reporting institutions can accurately supply this information as more libraries adopt computerized circulation systems. Find out whether these agencies are able to supply this information accurately. If so, begin collecting and reporting it.

Automated services. Consider making surveys of automated support services in libraries and automated database services offered by public libraries.

Titles/volumes. Study, and adopt if feasible, the collection of data which identifies the number of different titles as well as the number of volumes.

Telecommunications. As more public libraries use information technology and digital communications systems, consider collecting such data. This would require the development of standard definitions for telephone, FAX, and telecommunications capabilities.

Data Collection and Reporting

The Collection Process

Each participating State library should appoint from its staff a State data coordinator. The coordinator will be responsible for data collection and reporting and for answering questions from NCES about the State's data.

These libraries should collect data for the system annually. Each State may continue to collect the information for its own purposes and in any form it wishes to use, as long as it includes the data elements the system requires.

Reporting Periods and Schedules

Because the fiscal year of public libraries varies (even within a State), the system will not establish a uniform annual reporting period. Uniformity, while statistically desirable, would burden libraries and be widely resisted by their staffs.

Each State should therefore continue to collect data on its customary schedule. NCES should, however, establish the following period for reporting data to the system:

> "Each year, between July 1 and 31, the participants should submit to NCES data for the most recently completed fiscal year for which data are available."

(These specifications are based on the method the Census Bureau uses for its census of governments.)

Data will be identified by the year preceding the one in which it was sent to NCES. For example, data a State library agency sends to NCES in July, 1989 will be identified as 1988 data.

Types of Surveys

For the annual collection State libraries will gather data only from the library administrative entities. From time to time, however, NCES will conduct fast response sample surveys fromthe universe file. For these surveys NCES will communicate with the administrative headquarters of each surveyed library.

Reliability and Completeness of Data

To secure data as complete and accurate as possible, State data coordinators should work closely with local libraries. When data are not known, educated estimates should be made as preferable to supplying no data.

A State data coordinator can detect many errors in reports of data that come from libraries. In fact, a coordinator familiar with the libraries in the State can often discover inconsistencies and inaccuracies in responses just by scanning a report.

In addition to evaluation by the coordinator, the microcomputer software used to compile the data also will aid accuracy. For example, software can check for missing data and for mathematical accuracy.

State Data Coordinator Training

NCES should provide training for State data coordinators to help them work with libraries and the data they supply. NCES should also establish a continuing education program for State data coordinators. This should include regular gatherings for an exchange of ideas and information among participating States and with NCES.

Reporting the Data to NCES

Each year between July 1 and 31, State library agencies should send to NCES data for the most recent year for which collection has been completed. NCES should supply microcomputer equipment and software to the participating State libraries so that data can be reported by all states in the uniform, machine readable form NCES will specify. (State libraries will gain additional benefits if they also use the microcomputers and software to develop statistical applications to meet their own needs.) After receiving the data, NCES will perform error

detection procedures and will ask the State data coordinators to resolve any problems that may arise.

Ongoing Support from NCES

The successful continuation of the system will require an ongoing partnership between the NCES and the State library agencies. NCES should provide ongoing support for the participating states. Because of staff changes at State libraries, the State data coordinators will require continuous training and support. Additional training and support also will be needed because the system itself will not be static. Changes will result from shifts in focus, new data elements and definitions, as well as different collection and reporting methods.

Analysis and Publication of Data.

Data Analysis--Purposes and Types

Data analysis from the cooperative system will be meaningful not only to the library community but also to Federal, State, and local officials. These officials need information as they make decisions about legislation, appropriations, and resource allocation.

For these purposes the system should produce:

-- Data for each State.

-- Data by size of library, measured by population served, collection, total staff, and total operating expenditure.

-- Comparisons of input data elements with output data elements. For example, expenditures with services.

-- Data for public libraries that can be analyzed by type of governance, such as city, county, or special district.

-- Data that can be analyzed by type of public library. Forexample, data that provide comparisons between libraries that are members of public library systems and those that are not, and comparisons by size, by type of outlet, and by administrative organization.

NCES should provide this data in State, regional, and national tabulations. NCES should also make data about individual library entities available on tape.

Published Data, Formats, and Media -- Data should be available on tape, floppy disk, and in printed form. The same information that is available on tapes should be available on diskettes. NCES refers to data published on paper as tabulars. Tabulars appear in three forms:

EdTabs -- Tabulations with footnotes but without interpretation. Available for the system's data by September 30 each year.

Bulletins -- Tables and interpretation. Available starting in October.

Analysis Reports -- Trend analysis. After the system has been operating at least three years, available periodically.

Data in these printed documents should be presented in State summaries, not by institution. Tapes should include institution data which State officials and other users can analyze for individual library comparisons. The format for the tables of data are given in Appendix D.

Disseminination Methods for Publications

NCES should make the publications available without charge for at least six months and after that by purchase. Each cooperating State should be provided without charge with tapes or diskettes for data from all States. Tapes and diskettes should also be available to others from NCES by purchase.

NCES should produce the printed documents (EdTabs, bulletins, and reports) in sufficient quantity to provide reasonable numbers of copies to cooperating States, national associations, library schools, and individuals. NCES should arrange for printing enough copies for distribution to Federal depository libraries by the Superintendent of Documents of the U.S. Government Printing Office (GPO). GPO should also have copies for sale.

State-Federal Cooperation in Analysis

Expertise by many State library agency staff in analyzing and using data is limited. The effective and efficient use of data produced in the system by State and local decision makers requires skilled guidance from State library staff. NCES therefore should make a major commitment to improving the analysis capabilities of the State library agencies through training, consultation, and internships.

Technical Concerns

NCES's Standards and Policies (March 16, 1987) should be the system's guide for procedures involving data. NCES staff should give special attention to the clarity of documentation so that persons outside NCES can use the tapes.

Cooperation between the State data coordinators and NCES should solve longstanding problems with errors and inconsistencies in public library data. Moreover, the reliability of data should be increased as State agency staff detect errors through use of software from NCES. The system's effectiveness will improve as bias is reduced by continuing communication between NCES and the coordinators and chief officers in the States.

Within three years of the system's operation NCES is expected to be able to fill gaps in data based on earlier tabulations. Error detection, with the help of software provided to the States by NCES, should also increase the reliability of statistical data. Finally, training of staff and advice from library associations should help raise the quality of data the system collects.

Dissemination of Public Library Data in Popular Formats

Tapes, discs, and the printed publications described will provide a wealth of valuable information about public libraries. The format and content, however, are not designed for general reading. To reach a wider audience, the data should be published in a variety of other styles and formats. These might include issues-oriented articles in public administration/management publications for policy makers. The system could produce customized reports for local, State, and Federal officials. Publications and programs sponsored by library organizations could communicate the system's data. An annual report in a library publication similar to the annual survey of beginning professional salaries could create in readers a desire for additional information.

The production of these forms of general publication of data will require an annual plan which should include the work to be done and assign the responsibility for its accomplishment. The task force recommends that the panel which will oversee the cooperative system be responsible for making this plan.

Training Program for Participants

To ensure the timely reporting of consistent, accurate data to the system will require an ongoing training program. NCES should provide training on a variety of levels and for a variety of needs.

Participants in the Training Program and Their Needs

The system must communicate general information to two groups in State library administration. State librarians will need to be informed about the system's products to motivate them to participate in its program. Other State personnel who share in

the administrative or budgetary control of the State library agency will also need general information that will lead to their support of the State library agency's commitment to participate in the system.

In addition to this general information, State data coordinators will also need training to provide them with knowledge and skills in specific areas. Their training should convey:

-- An understanding of the significance of each data element and the appropriate methodology for its collection.

-- An understanding of the definitions of the data elements.

-- The ability to operate the microcomputer equipment and software supplied through the system for the submission of data.

-- An understanding of the concepts of effective forms design for data collection.

-- Knowledge of effective methods for working with public libraries to elicit prompt and accurate responses to requests for data.

-- Skill in the use of basic data editing techniques for error detection.

This basic level of training which NCES will provide to all State data coordinators will deal only with the data elements to be reported to the system. Beyond this, NCES might offer more advanced training. This might incorporate data collection techniques for a broader range of data elements, the development of data analysis skills, presentation of uses of the system data in planning and policy development, and methods to present and communicate the data.

Training Program Strategies and Resources

Video for a General Audience. For persons needing general information which will lead to or reinforce their commitment to participate in the system, the task force recommends the production of a ten to fifteen minute video. The video's main message would be the uses of timely and accurate data in local, State, and national policy development and planning. Supplementary printed pieces should be produced for use with the video.

Training for State Data Coordinators

The training of State data coordinators will be a continuing process. Staff changes among State data coordinators and the evolution of the system will necessitate periodic repetition of each type of training session. NCES should also sponsor an annual gathering of State data coordinators, perhaps during the ALA annual conference.

NCES also should arrange for production and distribution of a manual for the coordinators. It should include:

-- Basics of good data collection and compilation.

-- A rationale for the data elements selected for the system.

-- Definitions of these data elements.

-- Methodologies for collecting the data elements.

-- Guidance on the creation and maintenance of the universe file.

-- Methods of data editing for error detection.

-- Guidance about the communication, presentation, and use of the data.

-- Instructions on the use of the microcomputer software NCES will provide.

-- Directions for reporting data to NCES.

General Recommendations

In participating States, the State data coordinators will differ in their experience and previous levels of responsibility. Their knowledge of statistics, microcomputers, and libraries will vary. The development of the training program must accomodate these differences.

Pilot project participants have amassed considerable knowledge and experience that can be valuable to the system. The training program planners should consult them about training needs to determine what topics and techniques may be essential or useful. The pilot project participants might also be peer coaches for staff of new participating States. The coaches might provide telephone or on-site consultation and also encouragement.

The task force recommends that the system's training program and materials be developed and carried out through a contract with a person or agency. NCES should select a qualified and experienced person or company to work on the development of the system's training program.

Information About State Library Agencies

Every State library agency plays a fundamental role in the provision of public library service within its State. A system containing public library data would be incomplete without data on the State library agencies.

The collection of statistical information about State library agencies has a short history. In 1977, when NCES published its first collection of these data in its **Survey of State Library Agencies** (1977), the agencies had only one common denominator. It was the administration of the Federal Library Services and Construction Act.

In the interim the Chief Officers of State Library Agencies (COSLA) has collected and published fiscal information. Data have included appropriations, expenditures, and salaries.

During the past decade dynamic changes have occurred in State library agencies, causing changes in functions and roles. Therefore the task force recommends that NCES conduct an annual survey of State library agencies that will provide a comprehensive statistical overview of these agencies.

THE FEDERAL/STATE PARTNERSHIP

State Participation in the System

An Emerging System

The Task Force views the system as an emerging one which should in the next few years include all 50 States. The law authorizing the system makes it clear that it is to be voluntary and that all States are encouraged to join. State library agencies have a commitment to improve statistical systems and to the concept of Federal-state cooperation. This commitment has been reflected in practice over the years. Examples of cooperative actions are LIBGIS in the 1960s; the priority expressed in the 1984 ALA report, **Realities of Educational Reform in a Learning Society**; and in standards five and six in **Standards for Library Functions at the State Level** (ALA/ASCLA, 1985, 3rd. ed.).

Differing situations and priorities in the States make it impractical to expect that 50 States can participate fully in the new system as early as 1989. Yet the following levels of participation can be expected from the outset:

-- The States participating in the pilot that began in 1987 will continue. Additional States are expected to participate. Nineteen States participated in the July, 1988 phase of the project.

-- Every State should participate in 1988 and 1989 to the extent of taking two actions. First, each should designate a State data coordinator to work with NCES and join in appropriate training programs. Secondly, before June, 1989 each State should prepare a state universe file. By September 30, 1988, 45 States and the District of Columbia had designated State data coordinators.

Requirements for Full Participation and Effective Operations

Benefits to Attract Participants

The rate at which States will participate will depend on the system's products and results, and on perceptions about the system. The rate will also depend on the priorities and capacities of state library agencies. To attract adherents, those working with the system must give attention to publication information, to communications, and to public relations.

Among the promising factors for participation are the benefits of the training State personnel will receive and equipment that States will recieve. State library agency staff also will value the increased analytical power the system will give them to make valid comparisons with other States. Another benefit will be the ability to produce and receive custom reports and analyses from NCES. Finally, each State will gain access to data from other states and from the universe file.

Association and Agency Support

Formal support by both COSLA and ALA will be important in securing full participation. ALA and PLA should encourage public libraries to cooperate by submitting data to their State library agencies accurately and promptly.

For effective operation of the system, the task force recommends that NCES provide the States with training and other needed resources so they can meet the NCES statistical standards. NCES should also supply needed support to the states as they carry out all the responsibilities of system participants.

Contract Operations

In planning and launching the new system, NCLIS and the task force are supplying coordinating, operating, and advisory services to NCES. When this preliminary period ends, there will be a continuing need for such services. NCES's experience in other data collection systems has made clear the advantages of having a contract with a national organization for operational services.

As an incorporated organization of the 50 State librarians, the Chief Officers of State Library Agencies (COSLA) can provide such services. To do so, however, will require staff, a permanent, standing committee on the Federal-State Cooperative System for Public Library Data, and appropriate mechanisms for participation by chief officers and data coordinators of State libraries.

Until such a contract can be arranged, the task force recommends that during 1988/89 and possibly through 1989/90 NCLIS continue its interagency role with help from NCES. The task force also urges NCLIS to encourage each State to participate in the system. NCLIS has a valuable link with NCES through the membership of the NCLIS chair on the NCES advisory council. NCLIS should keep the topic of library statistics on the agendas for discussion and action by commission members and staff and on those of the committee for the White House Conference on Library and Information Services.

State Support

Participation in the system will require actions by each State library agency. The library should:

-- Name a coordinator.

-- Develop and adopt a policy statement that makes clear the State's commitment to collecting, analyzing, and disseminating data which are useful, timely, and comparable.

-- Allocate or reallocate resources to make it possible to participate effectively in the system.

-- Participate in training offered by NCES and extend appropriate parts of that training to others in the State.

-- Cooperate in the system's special studies.

Federal Participation in the System

Included within the NCES mandate are statistics about public, academic, school, and special libraries, as well as library networks, systems, and cooperatives. This mandate is based on the School Improvement Act of 1988 (PL 100-297). The law gives NCES broad powers to "acquire and diffuse among the people of the U.S. useful statistical information on subjects connected with education (in the most general and comprehensive sense of the word)." Libraries are identified as one of those "subjects."

In addition, the law states: The Center (NCES) with the assistance of the State library agencies "shall develop and support a cooperative system of annual data collection for public libraries." The law also says:

> "Attention should be given to insuring timely, consistent, and accurate reporting."

The task force recommends that support by NCES should take the form of training, technical assistance, equipment, workshops, and interagency staff exchanges. These support functions should be included in NCES's future appropriations requests, which should include not only funds to support the activities required by the system, but also an appropriate number of permanent staff positions. These staff should work full time to carry out the coordination and leadership functions required of a successful nationwide cooperative system.

Close communication between NCES and the States is imperative. Efficient use of NCES staff, however, precludes contact with each of the 50 States. Instead an intermediary organization should by contract coordinate activities between NCES and the 50 State library agencies. This coordination would include the provision of support to encourage initial and continuing participation in the system.

A contract between NCES and another organization, such as NCLIS or COSLA, to provide this support, would require that NCLIS or COSLA begin activities to develop and establish the necessary organizational structure.

The task force recommends that NCES, in order to carry out its mandate for public library statistics, should:

-- Continue to support the work of the task force by planning for the creation and development of the system.

-- Determine the financial and personnel resources needed to carry out the recommendations of the task force.

-- Provide training, equipment, and technical assistance to state library agencies that participate in the system.

-- Establish a universe file of all public library entities, which can be used for the system's annual survey and future sample surveys.

-- Annually, through the system collect and publish State-by-State public library statistics.

-- Work actively to gain participation of all 50 states in the system.

-- Explore future, long-range support for the system through contracts with COSLA.

-- Through sample surveys, gather data on issues affecting public libraries. Such issues or topics might include:

> public library services provided to school-age children in support of their studies, public library services for business and industry, facts and trends in the supply of public library staff and such characteristics of library staff as training and experience.

-- Develop a program to collect data annually from state library agencies about their administrative operations and their services on behalf of public, academic, and school libraries within each State.

-- Include questions about public library users on NCES's planned, occasional household survey. These questions should supplement the information acquired through the system. It should provide data on public library use by different age, sex, race, and economic groups, including which services each group uses and why.

Abbreviations in This Report

ALA -- American Library Association
COSLA -- Chief Officers of State Library Agencies
FSCS -- Federal-State Cooperative System for Public Library Data
LIBGIS -- Library General Information Survey
NCES -- National Center for Education Statistics
NCLIS -- National Commission on Libraries and Information Science
OERI -- Office of Educational Research and Improvement
PLDS -- Public Library Data Service

SOURCES OF INFORMATION ON THE NEW COOPERATIVE SYSTEM

Participating state libraries and many public libraries can supply more information about the new system.

APPENDICES

APPENDIX A

Universe File Requirements
(All information to be provided by the State Library Agency)

ITEM #	ITEM NAME	Coding structure and comments
1	Entity identification code number	To be assigned by the state agency - NCES will provide assistance if no state code exists
2	Entity name	May be used to generate mailing labels
3	Entity address	May be used to generate mailing labels
4	Entity city or town	
5	Entity basic zip code	
6	Zip+four	
7	Entity telephone number	
8	County of this entity	
9	Metropolitan status code for this entity	0 - Not in MSA (Metropolitan Statistical Area) 1 - Within the city limits of the Central City of an MSA 2 - In an MSA but not within the Central City limits
10	Data reporting status code	1 - This is a library administrative entity 2 - This is not a library administrative entity but is a unit of a larger entity which does report

11	Administrative status code	0 - Not an administrative entity, outlet only 1 - Single outlet administrative entity 2 - Multiple outlet administrative entity with two or more buildings/bookmobiles 3 - Administrative only, only, not open to the public 4 - State library agency
12	Outlet type code	0 - Not an outlet, not applicable 1 - Central/Main library 2 - Branch 3 - Bookmobile
13	Library system relationship status code	0 - Not part of a system/network 1 - System/network member that receives services 2 - System/network member that receives and provides system services 3 - Headquarters of a system/network 4 - State library agency
14	Legal basis code	1 - City, Town, or Village 2 - County 3 - County/City 4 - School District 5 - Special District 6 - Multi-county 7 - Association 8 - State Agency 9 - Other
15	Reporting entity identification code number	For administrative/reporting entities This number will be the same as # 1. For Outlets - this number will be the Entity I.D. of the parent organization.
16	Population served by the administrative entity	This is the population of the legal service area of the administrative entity or an estimate thereof

17	Population served: non-reporting entity	This is an estimate of the service population range of a non-reporting entity A - Less than 1,000 B - 1,000 - 2,499 C - 2,500 - 4,999 D - 5,000 - 9,999 E - 10,000 - 24,999 F - 25,000 - 49,999 G - 50,000 - 99,999 H - 100,000 - 249,999 I - 250,000 - 499,999 J - 500,000 or more Z - Not applicable, this is a reporting entity

Definitions for the Universe File

Administrative Only/Entity : a library administrative entity thatdoes not serve the public directly but may provide staff, materials and services to other libraries; may receive and spend funds on behalf of other libraries or contract with other libraries to provide various library services. Examples are: federated or cooperative System Headquarters and county administrative entities.

Bookmobile: an auxiliary public service outlet that is a truck or van with a basic organized collection of library materials, a regular staff and a regular schedule for opening to the public. It is not an administrative entity.

Branch Library: an auxiliary unit which has all of the following: (1) separate quarters, (2) a permanent basic collection of books, (3) established paid position, and (4) a regular schedule for opening to the public. They are, however, administered from a central unit.[1] Regional or divisional centers should be counted as branches."

Central/Main Library: the library outlet where the principal collections are kept and handled.

Deposit Center/Reading Center:[2]

Library Administration Entity : An autonomous public library or library system/federation that has its own governance and funding and files an annual report with the state library agency.

Multiple Outlet Library Administrative Entity: a library administrative entity that serves the public directly with more than one service outlet (branch or bookmobile).

Outlet: the entity providing direct public library service; may be a central library, branch, bookmobile or deposit collection/reading center. (see separate definitions)

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[1]Revised definition: The earlier definition read: "Branch Library: an auxiliary public service outlet that has separate quarters, a basic organized collection of books, an established regular staff, and a regular schedule for opening to the public. It is not an administrative entity. They are, however, administered from a central unit.

[2]Revised definition. "Deposit Center/Reading Center: This definition has been eliminated.

Single Outlet Library Administrative Entity: a library administrative entity that serves the public directly with one building or one bookmobile.

State Library Agency: that agency within each of the states and territories which administers the Federal Library Services and Construction Act funds and which is authorized by a state to develop library services in the state.

System/Federation: in this context means a group of autonomous libraries joined together by formal or informal agreements to perform various services cooperatively - such as resource sharing, communications, etc. It may be a federation, a cooperative, or an intra-state system. This does not include a single administrative unit with non-autonomous branches and does not include multi-state networks such as PALINET, SOLINET, etc.

APPENDIX B

CORE DATA ELEMENTS

IDENTIFICATION

Number	Date Element
1.	Code number
2.	Library name
3.	Address
4.	City or town
5.	Basic zip code
6.	Zip + four
7.	Telephone number

GENERAL INFORMATION

Number	Date Element
8.	Population of legal service area
9.	Central library
10.	Number of branch libraries
11.	Number of bookmobiles
12.	Number of other service outlets

EMPLOYEES, FULL-TIME EQUIVALENTS (FTE)

Number	Data Element
13.	Librarians with Master's degrees from programs accredited by ALA
14.	All employees holding the title of librarian (Including those counted in item 13)
15.	All other paid employees (Exclude plant operations, security, and maintenance staff)
16.	Total paid employees (Exclude plant operations, security, and maintenance staff)

INCOME

Number	Data Element
17.	Local government
18.	State government
19.	Federal government
20.	Other income (Includes donations, interest, fines, etc.)
21.	Total income (Includes items 17, 18, 19, and 20)

OPERATING EXPENDITURES

Staff:

Number	Data Element
22.	Salaries and wages (Exclude plant operations, security and maintenance staff)
23.	Employee benefits (Exclude plant operations, security and maintenance staff)
24.	Total staff Expenditures (Includes items 22 and 23)

Collection:

Number	Data Element
25.	Total expenditures on Collection

Other Operating Expenditures:

Number	Data Element
26.	All other operating expenditures
27.	Total operating expenditures (Total of items 24, 25, and 26)

CAPITAL OUTLAY

Number	Data Element
28.	Capital outlay

LIBRARY COLLECTION

Number	Data Element
29.	Books and serial volumes (Exclude microfilm)
30.	Audio materials
31.	Films
32.	Video materials
33.	Current serial subscriptions (Includes periodicals and newspapers in any format)

PUBLIC SERVICE HOURS PER WEEK

Number	Data Element
34.	Public service hours per week (unduplicated)
35.	Public service hours per week (duplicated)

SERVICES PER TYPICAL WEEK

Number	Data Element
36.	Attendance in library
37.	In-library use of materials
38.	Reference transactions

CIRCULATION

Number	Data Element
39.	Total circulation transactions

INTERLIBRARY LOANS

Number	Data Element
40.	Interlibrary loans provided to other libraries
41.	Interlibrary loans received from other libraries

DATA ELEMENT DEFINITIONS

Data elements 1 through 7 identify the library entity and are self-explanatory.

8. POPULATION OF LEGAL SERVICE AREA. The number of people in the geographical area for which a public library has been established to offer services and from which (or on behalf of which) the library derives income plus any areas served under contract for which the library is the primary service provider. THE DETERMINATION OF THIS POPULATION FIGURE SHALL BE THE RESPONSIBILITY OF THE STATE LIBRARY AGENCY.

SERVICE OUTLETS

9. CENTRAL LIBRARY. The single unit library or the unit where the principal collections are kept and handled. Also called main library. Some county, multicounty and regional library systems may not have a main library. Some systems may have an administrative center which is separate from the principal collections and is not open to the public.This type of building should not be reported.

10. BRANCH LIBRARIES.[3] Branch libraries are auxiliary units which have all of the following: (1) separate quarters, (2) a permanent basic collection of books, (3) a established paid position and (4) a regular schedule for opening to the public. They are, however, administered from a central unit. Regional or divisional centers should be counted as branches.

11. BOOKMOBILES. Trucks or vans especially equipped to carry books and other library materials and serve as traveling branch libraries. Count vehicles in use, not stops.

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[3]Revised definition of Branch Libraries. Earlier version under point (3) read: "a permanent paid staff."

EMPLOYEES, FULL-TIME EQUIVALENTS (FTE)

Report figures as of the last day of the fiscal year. Include unfilled positions if a search is currently underway.

FULL-TIME EQUIVALENT EMPLOYEES. To ensure comparable data, 40 hours per week has been set as the measure of full-time employment for the Cooperative System. To compute full-time equivalents (FTE) of employees in any category, take the number of hours worked per week by all employees in that category and divide it by 40. State library agencies may wish to include an example for local libraries to follow.

12. LIBRARIAN. Persons reported under this category usually do work that requires professional training and skill in the theoretical or scientific aspect of library work, or both, as distinct from its mechanical or clerical aspect. The usual educational requirement is a master's degree (or its historical antecedent) from a library education program approved by the American Library Association.

13. Librarians with master's degrees from programs accredited by ALA.

14. All employees holding the title of librarian, including those counted in item 13.

15. ALL OTHER PAID EMPLOYEES. Includes all other employees paid by the reporting unit budget except plant operation. security, and maintenance staff.

16. TOTAL PAID EMPLOYEES. Sum of items 14 and 15.

Note: States are free to collect information about staff in any way which satisfies local needs and accommodates local requirements. For national reporting, however, the distinctions made above should be observed.

INCOME *

17. LOCAL GOVERNMENT. All tax and nontax receipts allocated by the community, district, or region of the public library and available for expenditure by the public library. Do NOT include here the value of any contributed or in-kind services and the value of any gifts and donations, fines, or fees.

18. STATE GOVERNMENT. All state government funds distributed to public libraries for expenditure by the public libraries, except for federal monies distributed by the states.

19. FEDERAL GOVERNMENT. All federal government funds distributed to public libraries for expenditure by the public libraries, including federal monies distributed by the states.

20. OTHER INCOME. Report all income other than that reported in Items 17 through 19. Include, for example, gifts, donations, interest, fines, and fees. This amount is the difference between the sum of the income reported in Items 17 through 19 and the total income, reported in Item 21. Do NOT include the value of any contributed services or the value of "in-kind" gifts and donations.

21. TOTAL INCOME. Sum of items 17, 18, 19, and 20.

OPERATING EXPENDITURES

OPERATING EXPENDITURES are the current and recurrent costs necessary to the provision of library service, such as personnel, library materials, binding, supplies, repair or replacement of existing furnishings and equipment, and costs incurred in the operation and maintenance of the physical facility.

Note: State and/or local accounting practice shall determine whether a particular expense is operating or capital regardless of the examples in this definition.

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*Capital income should not be reported as part of any item.

22. SALARIES AND WAGES. This amount should be the salaries and wages for all library staff except plant operation, security and maintenance staff for the fiscal year. Salaries for plant operation, security, and maintenance staff, if paid from the reporting unit budget, should be reported in Item 26. Include salaries and wages before deductions, but exclude "employee benefits."

23. EMPLOYEE BENEFITS. The benefits outside of salary and wages paid and accruing to employees except plant operations, security, and maintenance staff, regardless of whether the benefits or equivalent cash options are available to all employees. Include amounts spent by the reporting unit for direct, paid employee benefits including Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, workmen's compensation, tuition, and housing benefits.[5]

24. TOTAL EXPENDITURES ON STAFF. Sum of items 22 and 23.

25. TOTAL EXPENDITURES ON COLLECTION. Include all expenditures for materials purchased or leased for use by the public. Include print materials, microforms, machine-readable materials, audiovisual materials, etc.

26. OTHER OPERATING EXPENDITURES. Include all expenditures other than those given in Items 24-25.

27. TOTAL OPERATING EXPENDITURES. Include Items 24, 25, and 26.

CAPITAL OUTLAY

28. CAPITAL OUTLAY. Funds for the acquisition of or additions to fixed assets such as building sites, new buildings and building additions, new equipment (including major computer installations), initial book stock, furnishings for new or expanded buildings, and new vehicles. This excludes replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation.

Note: Local accounting practices shall determine whether a specific item is a capital expense or an operating expense regardless of examples in the definitions.

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[5]EMPLOYEE BENEFITS. Only that part of any of employee benefits paid out of the public library budget should be reported.

COLLECTION

Report physical units (volumes) for items 29 through 32.

29. BOOKS and SERIAL VOLUMES. Books are nonperiodical printed publications bound in hard or soft covers, or in loose-leaf format, of at least forty-nine pages, exclusive of the cover pages; or juvenile nonperiodical publications of any length bound in hard or soft covers. Serials are publications issued in successive parts, usually at regular intervals, and as a rule, intended to be continued indefinitely. Serials include periodicals (magazines), newspapers, annuals (reports, yearbooks, etc.) memoirs, proceedings, and transactions of societies. Except for the current volume, count unbound serials as volumes when the library has at least half of the issues in a publisher's volume.

30. AUDIO MATERIALS. Materials on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically or electronically, or both. This includes audiocassettes, audiocartridges, audiodiscs, audioreels, talking books, and other sound recordings.

31. FILMS. The term film is used interchangeably with "motion picture" which is a length of film, with or without recorded sound, bearing a sequence of images that create the illusion of movement when projected in rapid succession (usually 18 or 24 frames per second). Motion pictures are produced in a variety of sizes (8, super 8, 16, 35, 55, and 70 mm) and a variety of formats (cartridge, cassette, loop, and reel).

32. VIDEO MATERIALS. Materials on which pictures, sound, or both are recorded. Electronic playback reproduces pictures, sounds or both using a television receiver or monitor.

33. CURRENT SERIAL SUBSCRIPTIONS. Report subscriptions received both purchased and gift. Do not report number of individual issues. The total number of subscriptions in the library system, including duplicates, should be reported.

Note: It is recognized that the above categories are not all-inclusive. Some types of materials will not be reported here.

PUBLIC SERVICE HOURS PER WEEK

Report public service hours per week reflecting the schedule followed during the majority of the weeks of the year. Ignore seasonal variations.

34. PUBLIC SERVICE HOURS PER WEEK (Unduplicated). Consider both main library and branches using the following method. If a library is open from 9:00 am to 5:00 pm Monday through Friday, it should report 40 hours per week. If several of its branches are also open during those hours, the figure remains 40 hours. Should Branch A also be open one evening from 5:00 to 7:00, the total hours during which users can find service becomes 42. If Branch B is open the same hours on the same evening the total remains 42, but if it is open 2 more hours on another evening, the total becomes 44 hours during which users can find service. Include bookmobiles if appropriate.

35. PUBLIC SERVICE HOURS PER WEEK (Duplicated). Count both main library and branches using the following method. If the main library is open 60 hours per week, report 60 hours. If you also have 3 branch libraries, open the same number of hours as the main library (regardless of whether or not all facilities are open at the same time), the weekly aggregate for the library is 4 times 60 = 240 hours. Include bookmobiles if appropriate.

SERVICE PER TYPICAL WEEK

A typical week is a week in which the library is open its regular hours, containing no holidays. It is seven consecutive calendar days, from Sunday though Saturday, or whatever days the library is open during that period. For counting items 36, 37, and 38 it is recommended that libraries use the methods described in Output Measures for Public Libraries, 2nd edition (ALA, 1987). If you have an annual count, please divide the total by 52 weeks to report for a typical week.

36. ATTENDANCE IN LIBRARY PER TYPICAL WEEK . Report the total number of persons entering the library per typical week including persons attending activities, meetings, and those persons requiring no staff services.

37. IN-LIBRARY USE OF LIBRARY MATERIALS PER TYPICAL WEEK. Report the total number of materials utilized in the library, but not checked out. Include reference books, periodicals, book stock, and all other library materials that are used WITHIN the library.

38. REFERENCE TRANSACTIONS PER TYPICAL WEEK. Report the total reference transactions per typical week. A reference transaction is an information contact which involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The term includes information and referral service. Information sources include printed and non-printed materials, machine-readable data bases (including computer-assisted instruction), catalogs and other holdings records, and, through and others both inside and and outside the library. When a staff member utilizes information gained from previous use of information sources to answer a question, report as a reference transaction even if the source is not consulted again during this transaction.

    Note: It is essential that libraries do not include directional transactions in the report of reference transactions. A directional transaction is an information contact which facilitates the use of the library in which the contact occurs and which does NOT involve the knowledge, use, recommendation, interpretation, or instruction in the use of any information sources other than those which describe that library, such as schedules, floor plans, handbooks, and policy statements. Examples of directional transactions include giving instruction for locating, within the library, staff, library users, or physical features, etc., and giving assistance of a non-bibliographic nature with machines.

CIRCULATION AND INTER-LIBRARY LOAN

39. TOTAL CIRCULATION TRANSACTIONS. Transactions that involve lending an item from the library's collection for use generally (although not always) outside the library. This activity includes charging, either manually or electronically, and also renewals, each of which is reported as a circulation transaction.

40. INTERLIBRARY LOANS. Library materials, or copies of the & materials, made available by one library to another upon 41 request. It includes both lending and borrowing. The libraries involved in interlibrary loan are not under the same library administration. Report loans provided to other libraries in Item 40. Report loans received from other libraries in Item 41.

APPENDIX C.

LIST OF CORE AND EXPANDED DATA ELEMENTS

The categorization in this list of a data element as CORE or EXPANDED expresses the current thinking of the Task Force. It is understood that the process of categorizing the data elements is evolutionary and open to future discussion. Future needs will dictate what data elements are to be collected for any given year.

(See page 14 for definitions of core and expanded data elements.)

IDENTIFICATION

Code	Number	Data Element
C	1.	Code number
C	2.	Library name
C	3.	Address
C	4.	City or town
C	5.	Basic zip code
C	6.	Zip + four
C	7.	Telephone number

GENERAL INFORMATION

Code	Number	Data Element
C	8.	Population of legal service area
C	9.	Central Library
C	10.	Number of branch libraries
C	11.	Number of bookmobiles
C	12.	Number of other service outlets

EMPLOYEES, FULL-TIME EQUIVALENTS (FTE)

Code	Number	Data Element
C	13.	Librarians with Master's degrees from programs accredited by ALA
E		Librarians with any masters degree
C	14.	Other employees holding the title of librarian
C	15.	All other paid employees (Exclude plant operations, security, and maintenance staff)
C	16.	Total paid employees (Exclude plant operations, security, and maintenance staff)

INCOME

Code	Number	Data Element
C	17.	Local Government
C	18.	State Government
C	19.	Federal Government
E		--LSCA Funds
E		--Other Federal
C	20.	Other Income (Includes donations, interest, fines, etc.)
C	21.	Total Income (Includes items 17, 18, 19, and 20)

OPERATING EXPENDITURES

Staff:

Code	Number	Data Element
C	22.	Salaries and wages (Exclude plant operations, security and maintenance staff)
C	23.	Employee benefits (Exclude plant operations, security and maintenance staff)
C	24.	Total Staff Expenditures (Includes items 24 and 25)

Collection:

Code	Number	Data Element
E		Print materials (Exclude current serial subscriptions and microfilms)
E		Current serial subscriptions (Include all physical formats)
E		Microforms (Except current serial subscriptions)
E		Machine-readable materials (Except current serial subscriptions)
E		Audiovisual materials
E		Other materials
C	25.	Total Collection Expenditures on Collection

Other Operating Expenditures:

Code	Number	Data Element
E		Preservation
E		Plant operations, security, and maintenance (Include salaries and benefits)
E		Furniture and equipment

Code	Number	Data Element
E		Other operating expenditures
C	26.	All other operating expenditures
C	27.	Total of operating expenditures (Total of items 24, 25, and 26)

CAPITAL OUTLAY

Code	Number	Data Element
C	28.	Capital outlay

LIBRARY COLLECTION

Code	Number	Data Element
C	29.	Books and serial volumes (Exclude microfilm)
E		Government documents in separate collections (Exclude microforms)
E		Microforms
C	30.	Audio materials
C	31.	Films
C	32.	Video materials
E		Machine-readable materials
E		Other library materials
C	33.	Current serial subscriptions (Include all physical formats)

PUBLIC SERVICE HOURS PER WEEK

Code	Number	Data Element
C	34.	Public service hours per week (unduplicated)
C	35.	Public service hours per week (duplicated)

SERVICES PER TYPICAL WEEK

Code	Number	Data Element
C	36.	Attendance in library
C	37.	In-library use of materials
C	38.	Reference transactions

CIRCULATION

Code	Number	Data Element
C	39.	Total circulation transactions

OTHER LIBRARY SERVICES

Code	Number	Data Element
E		Total number of programs/presentations to groups
E		Total number of persons attending programs/presentations
E		Number of online database searches

INTERLIBRARY LOANS

Code	Number	Data Element
C	40.	Interlibrary loans provided to other libraries
C	41.	Interlibrary loans received from other libraries

TABLED DATA ELEMENTS

(See page 14 for a definition of tabled data elements.)

Element

Registered Borrowers

Postage

Telephone and other forms of telecommunications

Contracted computer services

Online database searching

Computer hardware

Total library collections

Information requests answered for other libraries

Information requests sent to other libraries

Are microcomputers available to the public?
If YES, is their use free, for a fee, or some free/some fee?

Are online database searches free, fee, or some free/some fee?

Does the library produce or participate in the production of television programs?

APPENDIX D*

Table Shells

Following are descriptions of the tables that will be used in the publication of the data:

Table 1. Number of public libraries and population served by State: (year)

STUB LINES

States

Total responding libraries

Colorado
Florida
Idaho
Indiana
Iowa
Minnesota
Montana
New Hampshire
New York
North Carolina
Ohio
Oklahoma
Oregon
Pennsylvania

South Carolina
Texas
Utah
Washington
Wyoming

COLUMN HEADINGS

Population served

Total number of libraries

Total population served

Less than 1,000
1,000 - 2,499
2,500 - 4,999
5,000 - 9,999
10,000 - 24,999
25,000 - 49,999
50,000 - 99,999
100,000 - 249,999
250,000 - 499,999
500,000 - 999,999
1,000,000 and above
Nonresponsive to population served

Repeat all 13 columns for horizontal percentages

*All tables will provide separate data for:
Libraries open for 12 or more hours per week
Libraries open for less than 12 hours of service per week
Libraries not responding on hours of service per week

For Tables 2 through 17, the STUB LINES will be as follows:

STUB LINES

States

Total responding libraries

Colorado
Florida
Idaho
Indiana
Iowa
Minnesota
Montana
New Hampshire
New York
North Carolina
Ohio
Oklahoma
Oregon
Pennsylvania
South Carolina
Texas
Utah
Washington
Wyoming

Population served

Total population served

Less than 1,000
1,000 - 2,499
2,500 - 4,999
5,000 - 9,999
10,000 - 24,999
25,000 - 49,999
50,000 - 99,999
100,000 - 249,999
250,000 - 499,999
500,000 - 999,999
1,000,000 and above
Nonresponsive to population served

Table 2. Number and mean number of public library outlets by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Service outlets

Total number of libraries

Total number of central libraries
Number of libraries with a central library
Total number of branch libraries
Number of libraries with a branch
Average number of branches
Total number of bookmobiles
Number of libraries with a bookmobile
Total number of other outlets
Number of libraries with another outlet
Average number of other outlets
Nonresponse

Table 3. Number and mean number of public libraries full time equivalent staff by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Number of FTE staff

Total number of libraries

Total paid FTE employees

FTE employees holding the title of librarian
with a master's degree from an ALA
accredited program - number
Percent of total paid FTE employees
Total employees holding the title of
librarian - number
Percent with a Master's degree from an ALA
accredited program
All other paid employees
Nonresponsive to number of FTE staff
Percent of libraries that did not respond

Table 4. Number of public libraries and amount of income by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Income

Total number of libraries

Total income
Income from local governments - number
Percent of total income
Income from state governments - number
Percent of total income
Income from the Federal government - number
Percent of total income
Other income - number
Percent of total income
Nonresponsive to income
Percent of total libraries that did not respond

Table 5. Number of public libraries by total income category by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Income category

Total number of libraries

Total income
Less than $10,000 of income - number of libraries
Percent of total number of libraries
$10,000 - $49,999 of income - number of libraries
Percent of total number of libraries
$50,000 - $99,999 of income - number of libraries
Percent of total number of libraries
$100,000 - $199,999 of income - number of libraries
Percent of total number of libraries
$200,000 - $399,999 of income - number of libraries
Percent of total number of libraries
$400,000 - $699,999 of income - number of libraries
Percent of total number of libraries
$700,000 - $999,999 of income - number of libraries
Percent of total number of libraries
$1,000,000 - $4,999,999 of income - number of libraries
Percent of total number of libraries
$5,000,000 or more of income - number of libraries
Percent of total number of libraries
Nonresponsive to total income

Table 6. Number of public libraries by total income per capita by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Total income per capita

Total number of libraries

Total income
Less than $ 1.00 income per capita
$ 1.00 - $ 2.99 income per capita
$ 3.00 - $ 4.99 income per capita
$ 5.00 - $ 6.99 income per capita
$ 7.00 - $ 8.99 income per capita
$ 9.00 - $11.99 income per capita
$ 12.00 0 $14.99 income per capita
$ 15.00 - $19.99 income per capita
$ 20.00 - $29.99 income per capita
$ 30.00 or more income per capita
Nonresponsive to total income or population served

Table 7. Number of public libraries and amount of operating expenditures by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Operating expenditures

Total number of libraries

Total operating expenditures - amount
Salaries and wages - amount
Percent of total operating expenditures
Amount per outlet
Employee benefits - amount
Percent of total operating expenditures
Amount per outlet
Total staff expenditures - amount
Percent of total operating expenditures
Amount per outlet
Total collection expenditures - amount
Percent of total operating expenditures
Amount per outlet
All other operating expenditures - amount
Percent of total operating expenditures
Amount per outlet
Nonresponsive to operating expenditures

Table 8. Number of public libraries by total operating expenditures category by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Operating expenditures category

Total number of libraries

Total operating expenditures
Less than $10,000 of operating expenditures - no. of libraries
Percent of total number of libraries
$50,000 - $99,999 of operating expenditures - no. of libraries
Percent of total number of libraries
$100,000 - $199,999 of operating expenditures - no. of libraries
Percent of total number of libraries
$200,000 - $399,999 of operating expenditures - no. of libraries
Percent of total number of libraries
$400,000 - $699,999 of operating expenditures - no. of libraries
Percent of total number of libraries
$700,000 - $999,999 of operating expenditures - no. of libraries
Percent of total number of libraries
$1,000,000 - $4,999,999 of operating expenditures - no. of libs.
Percent of total number of libraries
$5,000,000 or more of operating expenditures - no. of libraries
Percent of total number of libraries
Nonresponsive to total operating expenditures - no. of libraries
Percent of total number of libraries

Table 9. Number of public libraries by total operating expenditures per capita category by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Operating expenditures per capita

Total number of libraries

Total operating expenditures
Less than $ 1.00 spent per capita - number of libraries
Percent of total number of libraries
$ 1.00 - $ 2.99 spent per capita - number of libraries
Percent of total number of libraries
$ 3.00 - $ 4.99 spent per capita - number of libraries
Percent of total number of libraries
$ 5.00 - $ 6.99 spent per capita - number of libraries
Percent of total number of libraries
$ 7.00 - $ 8.99 spent per capita - number of libraries
Percent of total number of libraries
$ 9.00 - $11.99 spent per capita - number of libraries
Percent of total number of libraries
$ 12.00 0 $14.99 spent per capita - number of libraries
Percent of total number of libraries
$ 15.00 - $19.99 spent per capita - number of libraries
Percent of total number of libraries
$ 20.00 - $29.99 spent per capita - number of libraries
Percent of total number of libraries
$ 30.00 or more spent per capita - number of libraries
Percent of total number of libraries
Nonresponsive to total operating expenditures or population served

Table 10. Number of public libraries by capital outlay category by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Capital outlay category

Total number of libraries

Total capital outlay
Less than $10,000 of capital outlay - number of libraries
Percent of total number of libraries
$10,000 - $49,000 of capital outlay - number of libraries
Percent of total number of libraries
$50,000 - $99,999 of capital outlay - number of libraries
Percent of total number of libraries
$100,000 - $199,999 of capital outlay - number of libraries
Percent of total number of libraries
$200,000 - $399,999 of capital outlay - number of libraries
Percent of total number of libraries
$400,000 - $699,999 of capital outlay - number of libraries
Percent of total number of libraries
$700,000 - $999,999 of capital outlay - number of libraries
Percent of total number of libraries
$1,000,000 - $4,999,999 of capital outlay - number of libraries
Percent of total number of libraries
$5,000,000 or more of capital outlay - number of libraries
Percent of total number of libraries
Nonresponsive to capital outlay - number of libraries
Percent of total number of libraries

Table 11. Number of public libraries by capital outlay per capita category by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Capital outlay per capita

Total number of libraries

Total capital outlay per capita
Less than $ 1.00 capital outlay per capita - number of libraries

Percent of total number of libraries
$ 1.00 - $ 2.99 capital outlay per capita - number of libraries
Percent of total number of libraries
$ 3.00 - $ 4.99 capital outlay per capita - number of libraries
Percent of total number of libraries
$ 5.00 - $ 6.99 capital outlay per capita - number of libraries
Percent of total number of libraries
$ 7.00 - $ 8.99 capital outlay per capita - number of libraries
Percent of total number of libraries
$ 9.00 - $11.99 capital outlay per capita - number of libraries
Percent of total number of libraries
$ 12.00 0 $14.99 capital outlay per capita - number of libraries
Percent of total number of libraries
$ 15.00 - $19.99 capital outlay per capita - number of libraries
Percent of total number of libraries
$ 20.00 - $29.99 capital outlay per capita - number of libraries
Percent of total number of libraries
$ 30.00 or more capital outlay per capita - number of libraries
Percent of total number of libraries
Nonresponsive to capital outlay or population served

Table 12. Number of public libraries and library collection by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Library collection

Total number of libraries

Book and serial volumes - total
Book and serial volumes - per capita
Book and serial volumes - average number per library
Book and serial volumes - average number per outlet
Audio materials - total
Audio materials - per capita
Audio materials - average number per library
Audio materials - average number per outlet
Films - total
Films - per capita
Films - average number per library
Films - average number per outlet
Video materials - total
Video materials - per capita
Video materials - average number per library
Video materials - average number per outlet
Current serial subscriptions - total
Current serial subscriptions - per capita
Current serial subscriptions - average number per library
Current serial subscriptions - average number per outlet

Table 13. Number of public libraries by number of book and serial volumes held by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Number of book and serial volumes held

Total number of libraries

Less than 20,000 books and serial volumes - number of libraries
Percent of total number of libraries
20,000 - 39,999 books and serial volumes - number of libraries
Percent of total number of libraries
40,000 - 69,999 books and serial volumes - number of libraries
Percent of total number of libraries
70,000 - 99,999 books and serial volumes - number of libraries
Percent of total number of libraries
100,000 - 299,999 books and serial volumes - number of libraries
Percent of total number of libraries
300,000 - 599,999 books and serial volumes - number of libraries
Percent of total number of libraries
600,000 - 999,999 books and serial volumes - number of libraries
Percent of total number of libraries
1,000,000 or more books and serial volumes - number of libraries
Percent of total number of libraries
Nonresponsive to books and serial volumes - number of libraries
Percent of total number of libraries

Table 14. Number of public libraries by number of public service hours per week (unduplicated) by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Public service hours per week (unduplicated)

Total number of libraries

Less that 20 hours per week - number of libraries
Percent of total number of libraries
20 - 39 hours per week - number of libraries
Percent of total number of libraries
40 - 49 hours per week - number of libraries
Percent of total number of libraries
50 - 59 hours per week - number of libraries
Percent of total number of libraries
60 - 69 hours per week - number of libraries
Percent of total number of libraries
70 - 79 hours per week - number of libraries
Percent of total number of libraries
80 hours or more per week - number of libraries
Percent of total number of libraries
Nonresponsive to hours per week (unduplicated) - no. of libraries

Percent of total number of libraries

Table 15. Number of public libraries by number of public service hours per week (duplicated) per FTE staff per outlet by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Public service hours per week (duplicated) per FTE staff

Total number of libraries

Less than 5 hours per week per FTE staff per outlet
5 - 9 hours per week per FTE staff per outlet
10 - 14 hours per week per FTE staff per outlet
15 - 19 hours per week per FTE staff per outlet
20 - 24 hours per week per FTE staff per outlet
25 - 29 hours per week per FTE staff per outlet
30 - 34 hours per week per FTE staff per outlet
35 - 39 hours per week per FTE staff per outlet
40 - 44 hours per week per FTE staff per outlet
45 hours or more per week per FTE staff per outlet
Nonresponsive to hours per week (duplicated) or FTE staff or number of outlets
Percent of libraries that did not respond

FORMULA: $\frac{AI}{P \times (I+J+K+L)}$

Table 16. Number of public libraries and services per typical week by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Services per typical week

Total number of libraries

Attendance in library - total
Attendance in library - per capita
Attendance in library - per library
In-library use of materials - total
In-library use of materials - per capita
In-library use of materials - per library
Reference transactions - total
Reference transactions - per capita
Reference transactions - per library

Table 17. Number of public libraries and circulation transactions and interlibrary loans provided to and received from other libraries by State and population served: (year)

STUB LINES

As described above.

COLUMN HEADINGS

Circulation and interlibrary loans

Total number of libraries

Circulation transactions - number
Circulation transactions - mean number per library
Circulation transactions - per capita
Circulation transactions - per typical week
Interlibrary loans to other libraries - number
Interlibrary loans to other libraries - mean number per library
Interlibrary loans to other libraries - per capita
Interlibrary loans to other libraries - per typical week
Interlibrary loans from other libraries - number
Interlibrary loans from other libraries - mean number per library
Interlibrary loans from other libraries - per capita
Interlibrary loans from other libraries - per typical week